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A Communication Strategy for Continente: Practical, Low Priced and Healthy Eating Solutions

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EXECUTIVE SUMMARY

The objective of this field lab is to develop a communication strategy for *Continente*, a client of the communication agency *FUEL*, in order to respond to four trends predicted for 2012: cocooning, resistance to temptation, food loving and need to make savings.

The document begins with the situation analysis of the market in which *Continente* competes, for which I decided to use the Creative Business Idea (CBI) strategic process. Therefore, this analysis consists of analyzing the market momentum, which is split in three separate analyses (category momentum, prosumer momentum and brand momentum), in order to reach the creative business idea that will define the overall communication concept that I propose. To this end, I did research on the food retail sector and analyzed the trends predicted for it. Then, to understand consumers and their relation with the brand, I did open-response questions to some people and, together with 3 colleagues, developed an online survey.

Based on the market momentum, and looking specifically to the trends food loving and need to make savings, I chose to develop a communication strategy focused on low priced, practical and healthy eating solutions, more specifically, on solutions that adapt *Continente*'s already existing products and expand its already existing services in order to be close to customers while providing them with eating alternatives that answer to their current needs and fit in their daily routines. Consequently, after defining three different sub-concepts, I developed some proposals and organized them per sub-concept and also per *Continente*'s type of store.

The document ends with the strategy test and the implementation plan for my proposals. To test the strategy, I developed an online survey and made close-response questions to the human resources department of some companies. To develop the implementation plan, I analyzed the data from the answers to the online survey and close-response questions, and did research on the stores, products, and services that already exist and satisfied the needs that I propose *Continente* to satisfy as well.

COMPANY AND BRAND BACKGROUND

Sonae is a Portuguese holding, founded in 1959, which entered in the food retail sector with the brand *Modelo* and acquired later the brand *Continente*. Chronologically: in 1985, opened the first Portuguese hypermarket (*Continente Matosinhos*); in 2006, acquired *Carrefour Portugal* hypermarkets and transformed them into *Continente* hypermarkets; and, in 2011, rebranded its *Modelo* and *Modelo Bonjour* stores, and *Continente* became its unique food distribution brand. Nowadays, there are 41 *Continente* hypermarkets, 111 *Continente Modelo* supermarkets, 26 *Continente Bom Dia* convenience supermarkets and 3 *Continente Ice* convenience stores specialized in frozen food (1 in Lisbon and 2 in Oporto).

Continente, a food retail brand perceived by people as a food and non-food brand, has the mission to be close to customers while offering them constant innovation, an outstanding purchasing experience, and the best services, products and prices. Its primary business objectives are to consolidate its leadership in the food retail sector and continue to increase its market share. To this end, it offers in its stores the label *é* (best price), the private labels *Continente*, *Continente Gourmet*, *Área Viva Continente* and *Selecção Continente* (best price/quality relationship), the *Cartão Presente* (a rechargeable card to be used at *Sonae*'s retail stores), the *Continente Mobile* (a mobile telecommunications service) and the *Seguros Continente* (an automobile, motorcycle and health insurance service). In 2012, due to its overall performance, it was elected for the tenth consecutive year, "*Marca de Confiança*".

SITUATION ANALYSIS

The CBI process[1] generates business ideas which transform a brand and help grow business by merging creativity and effectiveness. In the situation analysis, I analyzed the category momentum (the business category in which the brand is in, the competitive brands and their advertising), the prosumer momentum (consumers and the trends which will influence them)

[1] EURO RSCG strategic tool to develop creative business ideas

and the brand momentum (the brand's evolution and what will help it to move forward in the category). To perform them I developed market research, starting by making face-to-face open-response questions to 9 women with ages ranging from 22 to 79 years and then getting together with 3 colleagues (Filipa Alves, Sara Simões and Susana Mata) to share information and create an online survey (Appendix 1), targeted to people with 20 or more years who were responsible for grocery shopping[2]. The data analysis was done individually based on the data that was gathered by all of us. In my case, I used as data the answers of 352 people, 251 women and 101 men, the majority being from Lisbon, employed and married, and having a college degree.

- **Category Momentum**

Continente belongs to the food retail sector. The business model of the companies in this sector consists of: charging a higher price to customers than the one paid to suppliers, charging suppliers for their shelf space, and being financed by suppliers through terms of payment.

The sector is comprised of hypermarkets and supermarkets[3] (e.g.: *Auchan*, *Continente*, *Intermarché*, *Pingo Doce*) and, discount stores (e.g.: *Lidl*, *Minipreço*). Regarding trends, the market share of hypermarkets and supermarkets has increased while the market share of discount stores has remained almost unchanged[4]. Nowadays, hypermarkets and supermarkets also offer low priced products through their private labels, despite offering a wider range of choice at different price points. Actually, private labels weight on sales has been increasing since customers associate them with similar or better quality than manufacturer brands and believe they can increase savings when choosing them over manufacturer ones (in 2011, private labels accounted for 47% of purchases in hypermarkets and 45% in supermarkets)[5].

The major changes in the sector resulted from three factors: the decision taken by the two largest distribution groups, *Sonae* and *Jerónimo Martins*, to have only one brand associated to

[2] I also printed the survey and made interviews at *Minipreço Campolide*, *Pingo Doce Campolide*, *Pão de Açúcar Amoreiras* and *Continente Colombo*
[3] Supermarkets have an area between 200 and 2000m^2 and hypermarkets have an area above 2000m^2
[4] APED (2011) *Ranking APED*; Jornal Económico (2011), *Continente reforça liderança de mercado face ao Pingo Doce*
[5] Deloitte Touche Tohmatsu (2011), *Christmas 2011 – Portugal*

their stores; the greater convenience, given that hypermarkets are now placed in both big and small sized cities; and, the higher diversity in the type of stores and products offered.

Furthermore, nowadays, almost all brands have been increasing their investments on national products: *Continente* has a producers club with more than 245 members; most of *Pingo Doce*'s and *Auchan*'s private labeled perishables and grocery products are from national producers; and, *Intermarché* has a program (*Programa Origens*) to support national producers.

The primary obstacle in the sector is the Portuguese recession; more precisely, the decrease in disposable income. However, since food is an essential good, the majority of consumers are not willing to cut consumption on groceries[6] and, consequently, shift to low priced products.

Regarding the sector's market structure, in the first semester of 2011, the five leading brands had a joint market share of 69,9%, from which 44,3% was from the two leading brands, *Continente* and *Pingo Doce*[7].

- **Prosumer Momentum**

The major trends influencing people's attitudes and behaviors are: the fact that people will spend more time at home (cocooning); the need to resist impulse and increase savings; and, the higher demand for healthy products (food loving). Given these trends, there is a new type of consumer, with diverse family structures and from different social classes, that buys the most expensive labels only when there is value associated to that choice and prefers the most inexpensive option in everything else[8]. Moreover, this is a consumer that is increasing purchasing frequency and reducing the quantities purchased per visit. From the online survey, *Pingo Doce* is best positioned to take advantage of this. The majority goes to *Continente* only once (53%) or twice (24%) a month and goes to *Pingo Doce* once (33%) or more than once (28%) a week and, purchases big quantities at *Continente* (54%) and small quantities at *Pingo Doce* (41%).

[6] Deloitte Touche Tohmatsu (2011), *Christmas 2011 – Portugal*
[7] Jornal Económico (2011), *Continente reforça liderança de mercado face ao Pingo Doce* [*Continente* 25,4%, *Pingo Doce* 18,9%, *Intermarché* 9,5%, *Lidl* 9,1%, *Minipreço* 7% and *Auchan* (*Pão de Açúcar* and *Jumbo*) 6,3%]
[8] Jornal HiperSuper (2012), *Crise faz nascer o smartshopper*

Furthermore, given people's willingness to cut on eating out expenditures[9] and the increase in the number of working hours, which means working during lunch breaks and leaving work later, there is the need to substitute eating out with cheaper, practical but also healthy eating alternatives. One consequent emerging trend is to take lunch to work, a cheaper and healthier alternative to the repetitive and unhealthy menus of restaurants.

- **Brand Momentum**

The primary communication vehicles used by brands are advertisements (television, press, outdoors and radio), public relations, consumer sales promotions and direct marketing.

Table 1: Communication vehicles used by the sector's six leading brands

	Advertisements	Public relations	Consumer sales promotions	Direct marketing	Others
Auchan	Informative and persuasive		Customer loyalty card; Limited promotional campaigns	Website (online store); Promotional pamphlets	
Continente	Informative and persuasive	Events to support national producers; Social responsibility initiatives (health, environment and education)	Customer loyalty card; Promotional coupons; Limited promotional campaigns	Website (online store and *Mundo Continente* content); Promotional pamphlets; Magazine	Own mascot for children (Popota); Partnership with *Galp* and *EDP*; *Sonae*'s corporate relationships
Intermarché	Informative and persuasive	Events to encourage savings	Customer loyalty card; Limited promotional campaigns	Website; Promotional pamphlets	
Lidl	Informative and persuasive	Chef's participation in a television show; Social responsibility initiatives	Promotional coupons; Limited promotional campaigns	Website; Free newspaper	
Minipreço	Informative and persuasive		Customer loyalty card	Website; Promotional pamphlets	
Pingo Doce	Informative and persuasive	Social responsibility initiatives	Baskets with immediate cash discounts; Limited promotional campaigns	Website; Promotional pamphlets; Magazine	*Jerónimo Martins*' corporate relationships (example: Portuguese *Unilever*)

From the online survey, the majority of people noticed the advertisements on the television

[9] Deloitte Touche Tohmatsu (2011), *Christmas 2011 – Portugal*

(92%) and outdoors (37%) and the promotional pamphlets (45%), which communicate the promotions that are available in a given moment and, consequently, make customers aware of new opportunities that might be of their interest[10].

Regarding competitors, the majority thought that *Continente* was gaining ground to *Intermarché*, *Minipreço* and *Pão de Açúcar*, staying the same regarding *Jumbo* and *Lidl* and, losing ground to *Pingo Doce*; more precisely, 36% of *Continente*'s consumers and 55% of *Pingo Doce's* consumers thought that *Continente* was losing ground to *Pingo Doce*.

Regarding the two leading brands, during 2011 *Continente* had the highest index in the categories of reputation, trust and image, and was the brand which spent the most in advertising. *Pingo Doce* had the highest index in the categories of satisfaction and recommendation, and was the brand most recalled by residents in Lisbon and Oporto. [11]

From the online survey, *Continente*'s differentiation factors were its diversity (84%), organization and presentation (70%). Furthermore, it was the brand with the highest media awareness (44%). Its communications promote the variables of price, diversity and *Mundo Continente* and most of its television advertisements are directed to the holders of its customer loyalty card and have the same actor (Martinho Silva) as a speaker.

Pingo Doce's differentiation factors were its quality (81%), convenience (76%) and prices (72%). Furthermore, it was the brand that most people preferred (40%). Its communications promote the promise of having low priced and quality products, all year long, in its more than 360 stores, without requiring loyalty cards or promotional coupons.

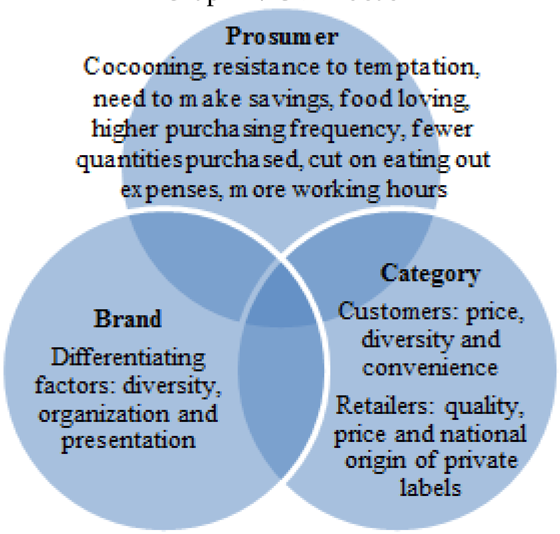
- **Strategic Ideas**

Concluding from the category momentum, the major variables influencing customers' choice of store are price, diversity and convenience, and retailers' strategies focus mainly on the quality, prices and origin of its private labeled products. From the prosumer momentum,

[10] Informal conversations during face-to-face open-response questions and interviews to customers
[11] Marktest: (2011), *Fnac lidera reputação na distribuição não alimentar*; (2012), *Modelo Continente foi maior anunciante em 2011;* (2012), *Pingo Doce lidera recordação publicitária no ano 2011*

consumers are spending more time at home, purchase only what is truly needed, are shifting to more economical solutions, want to gain or maintain healthy habits, prefer the most inexpensive labels, will increase purchasing frequency, reduce the quantities purchased per visit, cut on eating out expenditures and work more hours per day. From the brand momentum, *Continente*'s strongest characteristics are its diversity, organization and presentation.

Graph 1: CBI Focus



Taking into account these conclusions, my proposal for a future communication strategy for *Continente* is to **create practical, low priced and healthy eating solutions to customers**. To this end, I divided this overall concept in three different sub-concepts:

1. "*Com o Continente sinta-se em casa, mesmo quando está fora de casa*" Proposals that satisfy the need to make a meal without leaving the office in order to work, have a meeting, or have additional time for private affairs but also the need to increase savings and to gain or maintain healthy eating habits.

2. "*Cada vez mais próximo, o Continente chega agora ao seu local de trabalho*" Proposals that satisfy the same needs as concept 1 but take also into account the lack of time or unwillingness to prepare and take lunch to work.

3. "*Quando chegar a casa use o seu tempo para o que mais gosta e deixe que o Continente trate da sua refeição*" Proposals that satisfy the need to spend time with family and friends, and to make personal activities, the unwillingness to worry about thinking and preparing dinner, and the lack of time to make home-made meals but also satisfy the need to increase savings and to gain or maintain healthy eating habits.

COMMUNICATION STRATEGY: PROPOSALS[12]

Since some proposals are only feasible at some stores, I will organize them not only per concept but also per *Continente*'s type of store. For concept 1, I will also have proposals for two communication vehicles, and for concepts 2 and 3, some proposals will be based on *Continente*'s pre-made meals[13] and *Continente*'s take-away.

- **Concept 1: Make at home to take to work**

In order to encourage customers to prepare and take lunch to work, *Continente* could develop a line with *Continente*'s lunchboxes, lunch bags, food containers, bottles and tableware, which could be developed either by Portuguese designers or through the creation of a competition amongst design students. The line should have one sub-line for children and another for adults and would be available at *Continente* and *Continente Modelo*[14].

In order to help customers to better adapt their meals, *Continente* could develop cooking shows, at *Continente* hypermarkets, with tips regarding meals to be taken to work[15], and offer pamphlets in all its stores with recipes, whose ingredients are dinner leftovers, for meals appropriate to take to work or to give children to take to school.

Regarding *Continente*'s website[16], I propose to have *Chef Online* recipes appropriate for adults to take to work and children to take to school and split the existent *HiperSaudável* food plan for one week with different plans (e.g.: eat at home; do at home and take to work; do at home for children take to school; do at home and take to the beach or to a picnic).

Regarding *Continente Magazine*[17], I propose to have recipes appropriate for adults to take to work and children to take to school and offer, during summer editions, suggestions to go during lunch breaks in order to make a meal and recipes appropriate for taking to the beach or to a picnic.

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[12] Research: *Continente Vasco da Gama, Continente Bom Dia Almirante Raposo, Continente Ice* and *Continente*'s website
[13] Labels: *Continente, Continente Equilíbrio* (less caloric alternative or specific for cholesterol reduction), *Continente Infantil* (children) and *Continente Gourmet* (special occasions)
[14] Stores with the highest product diversity
[15] Examples: workshops "*Take Away feito em Casa*" at *Escola de Hotelaria e Turismo de Setúbal* and "*Marmitas*" at *Bistrô*
[16] *Chef Online*: *Continente*'s Chefs recipes; *HiperSaudável*: *Continente*'s nutritionists healthy tips and suggestions
[17] *Continente*'s monthly magazine; The May edition offered a lunch bag, for 10€, at *Continente* hypermarkets

- **Concept 2: Order to be delivered at work**

In order to create eating solutions that can be delivered at people's working place during lunch time, *Continente* could align its take-away to a job delivery service and allow customers to order lunch by phone, until the day before, to some *Continente* stores. My proposal is to: offer one main dish and the possibility to add as an extra a soup, a dessert and/or a drink; deliver once per day, from Monday to Friday, during a morning route in the delivery area of some stores[18]; and have weekly plans and discounts for the employees of a partner enterprise and discounts according to the number of meals of a given order.

- **Concept 3: Easy solutions to cook for dinner at home**

In order to create eating solutions so that people can enjoy their time once at home after work, *Continente* could create a weekly healthy take-away menu, equal for every store, with different daily options. My proposal is to have soup, main dishes (meat, fish and vegetarian), side dishes (carbs and vegetables), salads, snacks and desserts (sweets and fruit). As mentioned, this take-away could be aligned to a job delivery service and allow customers to order not only lunch but also dinner, in which case an afternoon route should be created.

Regarding *Continente Bom Dia*[19], *Continente* could: have a reservation service for take-away and allow customers to make in-store or phone reservations of meals to be picked up at the store in which the order was made; expand the offer of pre-made and fresh meals by offering healthier and wider options of recipes, such as soups, salads, meals and side dishes, for the labels *Continente*, *Continente Equilíbrio*, *Continente Infantil* and *Continente Gourmet*[20], in individual and family-sized packages; create regularly limited and innovative recipes; and, create individual and family-sized baskets with all the necessary ingredients to quickly prepare (recipes with a cooking time, in the maximum, of 30 minutes) a soup, salad or main dish.

[18] Potential delivery routes: *Campo Grande*, *Entrecampos* and *Campo Pequeno* (*Continente Bom Dia Campo Grande*); *Saldanha*, *Picoas* and *Marquês de Pombal* (*Continente Bom Dia Almirante Barroso*); *Amoreiras* and *Rua Braamcamp* (*Continente Bom Dia Santa Quitéria*); *Parque das Nações* (*Continente Vasco da Gama*); and, *Lagoas Park*, *Taguspark* and *Quinta da Fonte* (*Continente Oeiras Parque*)

[19] Most appropriate format for quick and small daily purchases; Located in urban areas with high population density

[20] There are no *Continente* salads, only *Continente Equilíbrio* vegetarian meatballs, hamburgers and fillets, and no *Continente Infantil* and *Continente Gourmet* meals

Regarding *Continente Ice*, *Continente* could: expand the offer of pre-made and frozen meals[21] by making something similar to the one proposed for *Continente Bom Dia*; and create a new home delivery service[22], with a unique weekly route during the evening for orders placed by phone or in-store, until the previous delivery day.

- **Additional Recommendations**

Since customers want packages that include suggestions and tips that stimulate their imagination, the layout of packages of pre-made meals could have: on the front, the size of the meal, the preparation time and the nutritional information[23]; and, on the back, *Continente*'s Chefs suggestions, such as side dishes, potential additional ingredients and with what to garnish, and *Continente*'s nutritionists' recommendations, such as who should avoid it.

In order to target customers that have food constraints or prefer to have alternative diets, *Continente* could expand its *Área Viva* products, offer more pre-made meals without gluten and/or lactose[24] and offer pre-made desserts with fructose or sweeteners as well.

Finally, taking as an example one idea presented by *FUEL*, *Continente*'s website could offer a catering service for coffee breaks. My proposal is to display some menus, with pre-defined articles, ask for an approximate number of people and make a link with *Continente Online*[25].

TEST OF THE STRATEGY

To test these strategies I did an online survey (Appendix 3), to people with 20 or more years and currently working; and interviews with close-response questions (Appendix 5) to the human resources department of some companies. My final samples are comprised of 69 people for the survey research and 14 interviewed companies[26].

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[21] There are only *Continente Equilíbrio* vegetarian lasagna and vegetarian pizza, and *Continente Infantil* breaded meat and fish
[22] Nowadays, deliveries are free but are only available, in *Campo de Ourique*, *Lapa*, *Amoreiras* and *Rato*, if purchases account for more than 60€
[23] *Continente* has its own nutritional information system, the *Semáforo Siga a Cor*
[24] There are only *Continente*'s pre-made and frozen lasagna bolognese and meat pie without gluten and lactose
[25] *Continente*'s store for online purchases (charges a service fee of 6€)
[26] *BES*, *Bright Partners*, *ctt*, *Gatewit*, *Henkel*, *Hilti*, *Mazars*, *McKinsey*, *Nestlé*, *Páginas Amarelas*, *REN*, *Unicre*, *Vodafone* and *Whirpool*

- **Concept 1: Make at home to take to work**

Regarding lunch from Monday to Friday, although 48% of people had never taken lunch to work, from these, 45% would be willing to do it in the future and 10% would not. The major reasons why people were not willing to do it were lack of time (50%), unwillingness or preference for the existing solutions at work (31%), and preference for the existing solutions out of work (27%); and, the major reasons why people did it or were willing to do it were being a cheaper (82%) and an healthier (65%) alternative and, also, a practical solution (19%).

From those that had taken or were willing to take lunch to work, 49% would certainly and 17% would probably buy, in supermarkets and hypermarkets, lunch bags and food containers.

- **Concept 2: Order to be delivered at work (Online Survey)**

Regarding lunch from Monday to Friday, although 59% of people had never ordered lunch and had it delivered at work, from these, 36% would probably be willing to make it in the future and 23% would not. The major reasons why people were not willing to do it were preference for lunching out of the workplace (34%), preference for the existing solutions at work (31%) and inexistence of a place where they could feel comfortable (23%). The major reasons why people did it or were willing to do it were lack of time to prepare lunch in order to take it to work (39%) and the need of healthier (33%) and cheaper (31%) eating alternatives.

From those that ordered or were willing to order lunch and have it delivered at work, 33% would certainly and 35% would probably pay for a service that enabled them to order lunch from a weekly healthy take-away menu in a supermarket or hypermarket until the day before.

- **Concept 2: Order to be delivered at work (Interviews to Companies)**

Although 93% had an area where workers could heat their own meals, only 79% had an area for workers to eat them. Furthermore, even though 57% did not have a partnership with a company that provided a service of orders and deliveries of meals to offices, the majority would certainly (21%) or probably (36%) make a partnership that allowed workers to order lunch from a weekly healthy take-away menu in a supermarket or hypermarket.

- **Concept 3: Easy solutions to cook for dinner at home**

Regarding dinner from Monday to Friday, the majority sometimes (25%), often (23%) or always (22%) made dinner; when cooked, often made healthy meals (58%); and, when not cooked, went to a restaurant (41%) or to a take-way service (25%) and, was satisfied with the available solutions (72%). Those that were not satisfied with the available solutions gave as major reasons: price (50%), quality (41%) and inexistence of healthy options (41%).

Regarding my proposals, 78% would like to have the possibility to cook quick and healthy meals once at home after work and 58% would like to have the possibility to take home, after work, healthy and ready-to-eat meals. More specifically, the majority would: certainly (38%) or probably (33% and 41%, respectively) go to a store to buy pre-made and frozen or fresh meals if there was a bigger variety of recipes and healthier options; certainly (33%) or probably (45%) go to a store to buy baskets with all the necessary ingredients for quick meals; certainly (14%) or probably (39%) go to a store to pick up an order, done until the day before, from the weekly healthy take-away menu; and, certainly (36%) or probably (29%) pay to order dinner, until the day before, from the weekly healthy take-away menu, and have it delivered at work.

- **Additional Recommendations: Food constraints and alternative diets**

The majority that bought products with fructose or sweeteners and/or products without gluten and/or lactose: bought them in supermarkets and hypermarkets (97%); would certainly (23%) or probably (48%) buy pre-made meals without gluten and/or lactose; and, would certainly (21%) or probably (36%) buy pre-made desserts with fructose or sweeteners.

IMPLEMENTATION PLAN

- **Targeting**

My proposals target Portuguese aged between 20 and 65[27] years, currently working, from the low to the high income class and, with a diverse marital status and family size. However,

[27] Retirement age in the Portuguese private sector

the proposal for a weekly take-away menu with a service that enables customers to order their dinner should take into account that: 71% of people with more than 50 years would not pay for both options of the service; 67% of married people and 67% of people belonging to a two-person household would not pay for the option to pick up at the store; and, 75% of people belonging to a two-person household would not pay for the option to have it delivered at work.

Concepts 1 and 2 should specifically target people who need to work during lunch breaks, whether always, often, sometimes or rarely, and people who may not need to work during lunch breaks but need to reduce eating out expenditures and/or want to gain or maintain healthy eating habits. However, concept 1 should target people that look for cheap, healthy and practical eating solutions while concept 2 should target those that also look for these eating solutions but do not have time to prepare lunch in order to take it to work.

Concept 2 also targets companies. In this case it should be taken into account the area surrounding the company, the existence of at-work eating solutions, such as cafeterias with special prices to workers[28], and the size of the company, since the majority of workers may not be financially interested and/or prefer taking lunch to work (the cheapest solution)[29].

Concept 3 should target specifically people that cook, once at home after work, whether always, often, sometimes or rarely, and people that do not cook but value the variables price, quality and existence of healthy options when looking for alternatives to cooking dinner.

- **Competitors**[30]

In the food retail sector: *Auchan*, *El Corte Inglés* and *Pingo Doce* also have a take-away service; *Auchan* and *El Corte Inglés* have an online store, which also charges a service fee of 6€; and, *Arka*, the only competitor of *Continente Ice* in Lisbon, offers pre-made meals selected by Chef Chakall and with recommendations from the dietitian Florbela Mendes.

In the healthy food segment, *Celeiro*'s supermarkets offer healthy food products and some

[28] Examples: *Nestlé* and *Caixa Geral de Depósitos*
[29] Example: *Whirpool*
[30] Research: *Arka*, *Celeiro Avenida Augusto Aguiar*, *Celeiro Vasco da Gama*, *El Corte Inglés*, *Go Natural* at *Pão de Açúcar Amoreiras*, *Pão de Açúcar Amoreiras*, *Pingo Doce Tomás Ribeiro*, *Smart Lunch* at *Colombo*'s shopping centre

stores have vegetarian and macrobiotic take-away snacks and meals. And *Pingo Doce* offers several options for people that have food constraints or prefer to have alternative diets, namely pre-made meals with tofu or soy.

Table 2: Take-away service of *Auchan*, *El Corte Inglés* and *Pingo Doce*

Brand	Features
Auchan	Inside stores; individual or family sized roast chicken/hamburgers menu; 12 different menus for lunch and/or dinner; *Go Natural*[31] inside *Pão de Açúcar Amoreiras*
El Corte Inglés	Outside the supermarket; weekly menu with a daily *paella*; menus for children's birthday parties; take-away phone orders; free delivery if the order costs more than 100€
Pingo Doce	Inside or outside stores; take-away phone orders, with 48 hours in advance and deliveries to be picked up at the store in which the order was made

For concept 1, there are brands, besides *Tupperware* and *Sigg*, which develop and/or sell lunchboxes, food containers, lunch bags, bottles and tableware with innovative and appealing designs, such as *Mescla Store*, *Smart Lunch* and *Valira*.

For concepts 2 and 3, there are phone and online services that deliver meals. Some services deliver meals from restaurants, such as *Central Menu*, *Comer em Casa* and *NoMenu*[32], and others deliver their own pre-made meals.

Table 3: Features of some home and/or job delivery services of pre-made meals in Lisbon

Service	Product	Characteristics	Orders, deliveries and service fee
A Marmita	Ready-to-eat meals for lunch	Job delivery service available from Monday to Friday; Weekly menu and "do it yourself" salads; Monthly payments at the beginning of the following month	Orders until 8:30pm from the previous day; Deliveries from 11am to 1pm and left at the receptionist of the enterprise; Free delivery if the order costs more than 3,49€
City Gourmet	Gourmet meals	Home and job delivery service; Weekly menu from Monday to Sunday; A *la carte* service; Enterprise plans; Monthly plans from one delivery per week to daily deliveries	Free delivery if the order costs more than 7,50€
Cook It	Frozen and stored under vacuum meals	Home delivery service; Casual line, gourmet line and baby&kids line	Orders done with four days in advance; Deliveries at Tuesdays and Fridays from 4pm to 7pm; Service fee between 5€ and 7€; Free delivery if the order costs more than 45€
One Two Taste	Ready-to-eat meals	Job delivery service available from Monday to Friday; Individual or group sized meals and menus	Lunch deliveries during the morning and dinner deliveries during the afternoon; Deliveries in *Lagoas Park*, *Tagus Park*, *Quinta da Fonte* and Center of Lisbon

[31] Healthy fast food restaurant chain with ready-to-eat meals in single and family (two people) sized packages

[32] Common features: delivery time of approximately one hour; minimum order between 12€ and 13,50€; service fee between 2,50€ and 3€

Service	Product	Characteristics	Orders, deliveries and service fee
Rotina Perfeita Dinner&Drinks	Ready-to-eat meals for dinner	Home delivery service available from Monday to Friday; Weekly menu and "do it yourself" salads; Monthly payments at the beginning of the following month	Orders done until 5pm; Deliveries from 6:30pm to 9pm; Free delivery if the order costs more than 3,99€; Deliveries in *Parque das Nações*

- **Differentiation**

Continente should communicate an even wider range of choice, namely with its products, labels and types of stores, and wider savings solutions, namely through its customer loyalty card. Furthermore, *Continente* should communicate its desire to help customers manage their household income, namely with products that adapt to their current and always changing needs.

- **Positioning**

Continente should not only communicate its desire to act in the main consumer expenditures of its customers but also its flexibility in order to create solutions that satisfy their customers' needs and fit in their daily routines. Furthermore, *Continente* should communicate the different ways in which the slogan "*Conte com mais, conte com o Continente*" can be applied.

CONCLUSION

Food retailers, as Carlos Liz[33] says, should shift the way they see consumers into what they value the most and also into where they reveal themselves and relate to, namely around food. People need to eat well. Therefore, and taking into account that the crisis and the extended working hours are used as an excuse for people to get out less, eating solutions with proper formats should be created that allow people, for instance, to lunch at work or even out, in one of the many places that Lisbon has to offer, without spending more money than if it was a meal at home; and, to make a healthy dinner at home without giving up the little time we have to do what we like best.

[33] Consumption investigator and owner of the market research company APEME – Jornal HiperSuper (2012), *10 tendências de consumo dos alimentos*

In my opinion, this is easy for *Continente* in that the concept already exists; it only needs to be further explored. Furthermore, due to the different formats of its stores, *Continente* can adopt different and specific strategies to each one rather than simply offer more products in hypermarkets and fewer products in convenience stores.

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APPENDICES

- **Appendix 1: First online survey**

1.Quando pensa num supermercado/hipermercado, qual é a primeira marca que lhe vem à memória?

Continente	44%
Pingo Doce	29%
Other	27%

2. Qual é o seu supermercado/hipermercado preferido?

Auchan	13%	Pingo Doce	40%
Continente	30%	Other	20%

3. Com que frequência costuma fazer compras?

	Continente	Pingo Doce
More than once a week	7%	28%
Once a week	16%	33%
Twice a month	24%	17%
Once a month	53%	22%

4. Em qual destes supermercados/hipermercados é que gasta a maior parte do seu orçamento em compras de supermercado/hipermercado?
Continente/Continente Bom Dia/Continente Modelo/Pingo Doce/Outro

5. Que tipo de compras faz? Compras de pequena dimensão/Compras de grande dimensão/Outra(s)

6. Como avalia os seguintes aspectos relativamente às marcas Continente e Pingo Doce?

	Continente	Pingo Doce
Price	59%	72%
Diversity	84%	51%
Convenience	56%	76%
Organization and presentation	70%	60%
Quality	68%	81%

7. Onde é que se recorda de ver a publicidade do Continente?

Television	92%
Pamphlets	45%
Radio	14%
Press	19%
Outdoors	37%
Cinema	1%
Other(s)	2%

8. Como é que acha que se encontra actualmente o Continente quando comparado com as seguintes marcas?

	Gaining ground	Staying the same	Losing ground
Intermarché	33%	21%	4%
Jumbo	25%	31%	24%
Lidl	23%	26%	14%
Minipreço	25%	22%	9%
Pão de Açúcar	25%	18%	4%
Pingo Doce	15%	29%	36%

9. Sexo: Feminino/Masculino

10. Distrito residencial: Aveiro/Beja/Braga/Bragança/Castelo Branco/Coimbra/Évora/Faro/Guarda/Leiria/Lisboa/Portalegre/Porto/Região Autónoma dos Açores/Região Autónoma da Madeira/Santarém/Setúbal/Viana do Castelo/Vila Real/Viseu

11. Nível de escolaridade[34]:
Nenhum/1º Ciclo/2º Ciclo/3º Ciclo/Ensino secundário/Ensino pós-secundário/Ensino superior

12. Situação profissional:
Estudante/ Trabalhador(a) estudante/Empregado(a)/Desempregado(a)//Reformado(a)

13. Estado civil: Solteiro(a)/Casado(a)/Divorciado(a)/Viúvo(a)

- **Appendix 2: Correlation analysis to the data from the first online survey**

			5.		*Continente* compared with *Pingo Doce*
			Small quantities	Big quantities	Losing ground
4.	*Continente*	%	6%	54%	36%
	Pingo Doce	%	41%	12%	55%

[34] Scale: *Instituto Nacional de Estatística* (INE)

- **Appendix 3: Second online survey**

1. Idade[35]: Entre 20 e 29/Entre 30 e 39/Entre 40 e 49/Entre 50 e 59/Igual ou superior a 60

2. Estado civil: Solteiro(a)/Casado(a)/Divorciado(a)/Viúvo(a)

3. Número de membros do agregado familiar[36]: 1/2/3/4/5 ou mais

4. Tem necessidade de trabalhar durante a hora de almoço e/ou de almoçar no local de trabalho? Sempre/Frequentemente/Ocasionalmente/Raramente/Não

5. Tem necessidade de fazer poupanças, nomeadamente, de cortar nas despesas com almoços fora? Sim/Talvez/Não/Não almoço fora/Sem opinião

6. Preocupa-se com a sua saúde e, como tal, quer ganhar ou manter hábitos alimentares saudáveis? Sim/Talvez/Não/Sem opinião

7. Leva o seu almoço, feito em casa, para o emprego?

Always	12%	Rarely	9%
Often	17%	Never	48%
Sometimes	13%	No answer	1%

8. Caso nunca tenha levado: Estaria disposto(a) a fazê-lo?

Yes	45%	No	10%
Maybe	19%	No opinion	26%

9. Caso nunca tenha levado e não esteja disposto(a) a fazê-lo: Quais as suas razões?

Unwillingness to prepare it	31%
Lack of time to prepare it	50%
Inexistence of a place where you can feel comfortable	19%
Inexistence of a place where you can heat the meal	19%
Inexistence of a place where you can have lunch	12%
Preference for the existing solutions at work	31%
Preference for the existing solutions out of work	27%
House near the workplace	4%

10. Caso leve ou esteja disposto(a) a fazê-lo: Quais as suas razões?

Cheaper alternative	82%	Quick solution	13%
Healthier alternative	65%	Have more variety	16%
Practical solution	19%	Possibility to choose ingredients	16%

[35] Scale from the client satisfaction surveys to the stores Jumbo and Pão de Açúcar
[36] Scale: INE

11. Caso leve ou esteja disposto(a) a fazê-lo: Adquiriria em supermercados e hipermercados malas térmicas e recipientes próprios para serem aquecidos em microondas que possibilitassem transportar e manter a refeição em boas condições?

Yes	49%
Maybe	17%
No, since I already have these type of products	22%
No, since I would buy them somewhere else	1%
No opinion	11%

12. Costuma encomendar refeições pré-feitas e prontas a comer para o almoço?

Always	0%	Rarely	20%
Often	1%	Never	59%
Sometimes	16%	No answer	4%

13. Caso nunca tenha encomendado: Estaria disposto(a) a fazê-lo?

Yes	17%	No	23%
Maybe	36%	No opinion	24%

14. Caso nunca tenha encomendado e não esteja disposto(a) a fazê-lo: Quais as suas razões?

Inexistence of a place where you can feel comfortable	23%
Inexistence of a place where you can heat the meal	9%
Inexistence of a place where you can have lunch	14%
Preference for taking home-made lunch to work	9%
Preference for the existing solutions at work	31%
Preference for lunching out of workplace	34%
House near the workplace	9%

15. Caso encomende ou esteja disposto(a) a fazê-lo: Quais as suas razões?

Unwillingness to prepare lunch in order to take it to work	22%
Lack of time to prepare lunch in order to take it to work	39%
Inexistence of solutions at work	12%
Need for cheaper alternatives	31%
Need for healthier alternatives	33%
Need for practical solutions	20%
Need for quick solutions	27%
Need to have more variety	8%

16. Caso encomende ou esteja disposto(a) a fazê-lo: Pagaria por um serviço de take-away num supermercado ou hipermercado, com um menu saudável semanal, que lhe permitisse encomendar, até ao dia anterior, e receber o almoço no dia seguinte no seu local de trabalho?

Yes	33%	No	9%
Maybe	35%	No opinion	23%

17. Costuma cozinhar quando chega a casa após o trabalho?

Always	22%	Rarely	19%
Often	23%	Never	10%
Sometimes	25%	No answer	1%

18. Quando cozinha, considera que as suas refeições são saudáveis?

Always	23%	Rarely	0%
Often	58%	Never	1%
Sometimes	14%	No answer	4%

19. Quando não cozinha, o que costuma fazer?

Go to a restaurant	41%
Order pre-made and frozen meals	8%
Order ready-to-eat meals	10%
Go to a place that sells pre-made and frozen meals	11%
Go to a place that sells ready-to-eat meals	19%
Go to a place with a take-away service	25%
Ask someone else to cook	11%
Eat something quick, practical and available at home (example: sandwich, cereals or fruit)	5%

20. Quando não cozinha, está satisfeito com as soluções que existem?

Yes	72%
No	16%
No opinion	12%

21. Caso não esteja satisfeito: Porquê?

Price	50%
Quality	41%
Variety of recipes	14%
Inexistence of healthy options	41%
Variety of healthy options	14%

22. Gostaria de ter a possibilidade de confeccionar, quando chega a casa após o trabalho, refeições rápidas e saudáveis?

Yes	78%	No	1%
Maybe	13%	No opinion	8%

23. Gostaria de ter a possibilidade de levar para casa, após o trabalho, refeições saudáveis e prontas a comer?

Yes	58%	No	4%
Maybe	35%	No opinion	3%

24. Das seguintes lojas, quais tem perto do seu local de trabalho e/ou de casa?
Arka/Continente/Continente Bom Dia/Continente Ice/Continente Modelo/El Corte Inglés/Jumbo/Pão de Açúcar/Pingo Doce

25. Deslocar-se-ia até à(s) loja(s) que indicou para comprar refeições pré-feitas e congeladas caso existisse uma maior diversidade de receitas e de opções saudáveis?

Yes	38%	No	23%
Maybe	33%	No opinion	6%

26. Deslocar-se-ia até à(s) loja(s) que indicou para comprar refeições pré-feitas e prontas a comer caso existisse uma maior diversidade de receitas e de opções saudáveis?

Yes	38%	No	16%
Maybe	41%	No opinion	5%

27. Deslocar-se-ia até à(s) loja(s) que indicou para comprar cabazes com todos os ingredientes necessários para confeccionar receitas rápidas?

Yes	33%	No	19%
Maybe	45%	No opinion	3%

28. Na(s) loja(s) que indicou, pagaria por um serviço de take-away, com um menu saudável semanal, que lhe permitisse encomendar, até ao dia anterior, refeições para o dia seguinte?

Encomendas levantadas na loja

Yes	36%	No	17%
Maybe	29%	No opinion	18%

Encomendas recebidas no local de trabalho

Yes	14%	No	20%
Maybe	39%	No opinion	27%

ALIMENTAÇÃO COM RESTRIÇÕES (produtos com frutose ou adoçantes e produtos sem glúten e/ou lactose)

29. Onde é que os compra?

Supermarkets and hypermarkets	97%
Stores specialized in natural products	14%
Parapharmacies	3%

30. Adquiriria em supermercados e hipermercados refeições pré-feitas e congeladas ou prontas a comer sem glúten e/ou lactose?

Yes	14%	No	10%
Maybe	29%	No opinion	7%

31. Adquiriria em supermercados e hipermercados sobremesas pré-feitas e congeladas ou prontas a comer com frutose ou adoçantes?

Yes	13%	No	19%
Maybe	22%	No opinion	7%

- **Appendix 4: Correlation analysis to the data from the second online survey**

			28. Entregas no local de trabalho		
			Sim	Talvez	Não
1.	20-29	%	54%	35%	11%
	30-39	%	44%	33%	22%
	40-49	%	29%	57%	14%
	50-59	%	0%	29%	71%
	60 ou +	%	0%	100%	0%

			28. Encomendas levantadas na loja		
			Sim	Talvez	Não
1.	20-29	%	22%	56%	22%
	30-39	%	13%	50%	38%
	40-49	%	33%	33%	33%
	50-59	%	0%	29%	71%

			28. Encomendas levantadas na loja		
			Sim	Talvez	Não
2.	Solteiro(a)	%	24%	60%	16%
	Casado(a)	%	6%	28%	67%
	Divorciado(a)	%	100%	0%	0%

			28. Entregas no local de trabalho		
			Sim	Talvez	Não
3.	1	%	58%	33%	8%
	2	%	22%	11%	67%
	3	%	58%	33%	8%
	4	%	40%	50%	10%
	5 ou +	%	25%	50%	25%

			28. Encomendas levantadas na loja		
			Sim	Talvez	Não
3.	1	%	33%	50%	17%
	2	%	0%	25%	75%
	3	%	33%	50%	17%
	4	%	17%	56%	28%
	5 ou +	%	0%	57%	43%

- **Appendix 5: Questions to companies' human resources department**

1. Têm um espaço nas instalações da empresa onde os trabalhadores possam aquecer as suas próprias refeições?

Yes	93%	No	7%

2. Têm um espaço nas instalações da empresa onde os trabalhadores possam realizar as suas próprias refeições?

Yes	79%	No	21%

3. Têm parceria com alguma empresa que forneça um serviço de encomenda e entrega de refeições nos escritórios?

Yes	43%	No	57%

4. Fariam parceria com uma empresa que fornecesse um serviço de take-away num supermercado ou hipermercado, com um menu saudável semanal, que permitisse aos trabalhadores encomendar, até ao dia anterior, e receber o almoço no dia seguinte no escritório?

Yes	21%	No	14%
Maybe	36%	No opinion	29%